

Global Underwater Warfare Market Size Study & Forecast, by System, Capability, Platform, and Regional Forecasts 2025-2035

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Abstracts

The Global Underwater Warfare Market is valued at approximately USD 26.01 billion in 2024 and is projected to expand at a compelling CAGR of 7.00% over the forecast period 2025–2035. As maritime defense strategies become more technologically intensive and tactically sophisticated, nations are steadily advancing their underwater combat capabilities. Underwater warfare encompasses the integrated use of submarines, unmanned vehicles, sonar systems, and advanced weaponry to safeguard territorial waters, deter threats, and ensure maritime dominance. The shifting dynamics of naval power, spurred by rising geopolitical tensions, underwater domain awareness, and a surge in submarine procurement programs, are expected to propel the market forward. Governments are leaning heavily into modernization plans, allocating sizeable budgets to enhance their underwater surveillance, tracking, and electronic warfare proficiencies.

An upsurge in unmanned underwater vehicle (UUV) deployments, coupled with breakthroughs in sonar and communication technologies, is significantly redefining the underwater battlespace. As maritime nations endeavor to safeguard shipping routes, oil exploration zones, and exclusive economic zones, investments in underwater warfare systems—ranging from autonomous platforms to sensor fusion architectures—are accelerating. Submarines, both conventional and nuclear-powered, remain a cornerstone of modern naval fleets and are driving the demand for sophisticated electronic warfare and integrated combat systems. Moreover, advanced torpedo systems, mine countermeasures, and multi-layered sonar nets are now pivotal to any naval strategy focused on threat detection and neutralization below the ocean's surface. However, challenges such as high R&D costs and stringent naval interoperability standards may pose friction to market momentum in certain developing

regions.

Regionally, North America held the dominant market share in 2024, owing to the extensive defense modernization programs spearheaded by the U.S. Navy, massive R&D investments, and rapid adoption of cutting-edge naval combat systems. The region continues to pioneer in deploying UUVs and integrating AI-driven sonar for deep-sea surveillance. Meanwhile, Asia Pacific is projected to experience the fastest growth over the coming decade, driven by escalating territorial disputes in the South China Sea, naval fleet expansion in India and China, and a strategic shift toward indigenous underwater capabilities. Europe also represents a critical market, underpinned by collaborative naval defense initiatives among NATO countries and the robust defense infrastructure in nations such as the UK, France, and Germany. In the Middle East and Africa, increased naval spending in maritime choke points such as the Red Sea and Strait of Hormuz is poised to enhance regional demand for underwater warfare technologies.

Major market player included in this report are:

Lockheed Martin Corporation

Thales Group

Raytheon Technologies Corporation

Northrop Grumman Corporation

BAE Systems plc

L3Harris Technologies, Inc.

Saab AB

Leonardo S.p.A.

General Dynamics Corporation

Elbit Systems Ltd.

Kongsberg Gruppen ASA

Ultra Electronics Holdings plc

Naval Group

Bharat Electronics Limited (BEL)

Atlas Elektronik GmbH

Global Underwater Warfare Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By System:

Unmanned Systems

Sonar Systems

Electronic Warfare Systems

Weapons Systems

Communications Systems

By Capability:

Support

Protect

Attack

Others

By Platform:

Surface Ships

Naval Helicopters

Submarines

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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